UWD Quoting Program V2
User Manual

UWD Quoting Program V2

Features:

- Accurate quotes
- Automatic updates
- Displays grid alignments
- No need to call for a quote
- Prevents questioning on orders which prevents hold-up on lead times
- User friendly
- Visual confirmation

Basic Steps

Step I

1. To open the UWD Quoting Tool:

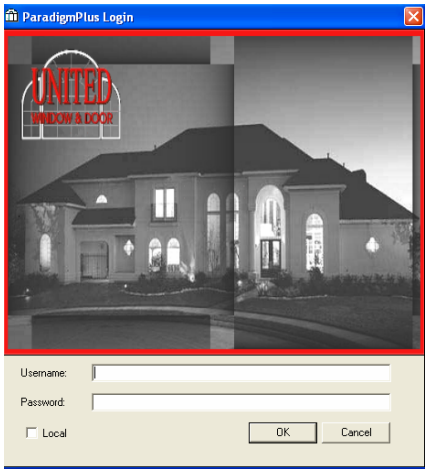
1.1. Double click on the UWD Quoting Program V2 Icon on your Desktop.

2. To log in:

2.1. Enter your first name and first letter of your last name in the “Username” box.

2.2. Enter your designated password.

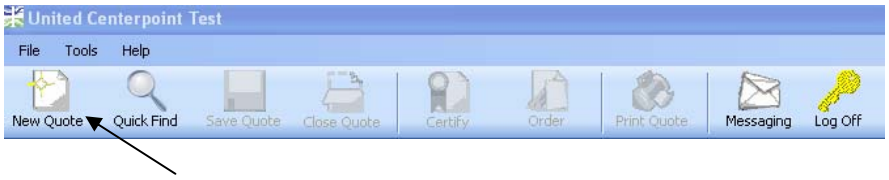
2.3. Click “OK”



Step II

1. **To create a new quote:**

   Click on “New Quote”:

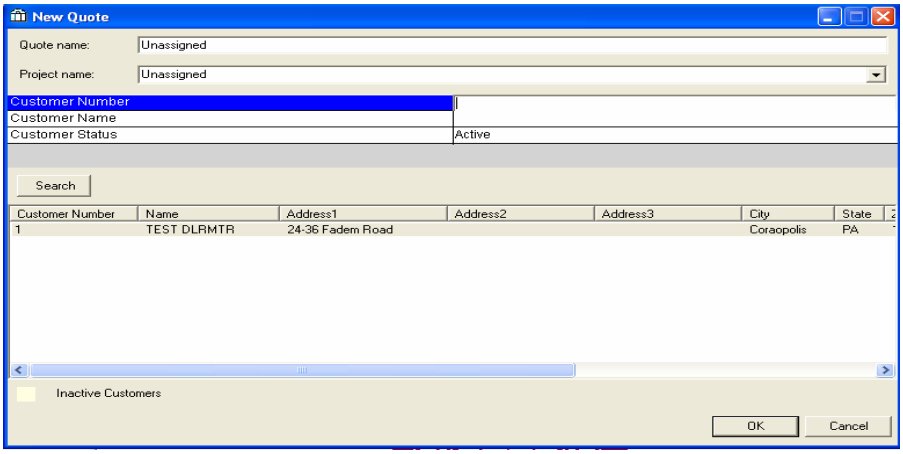


   1.2 . Name customer quote.

   1.3 . Name customer project.

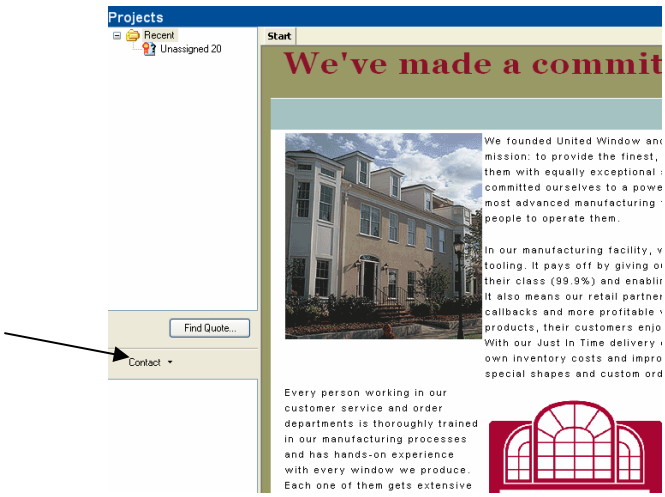
   1.4 . Select your dealer name by clicking on National Lumber Co.

   1.5 . Click “OK”

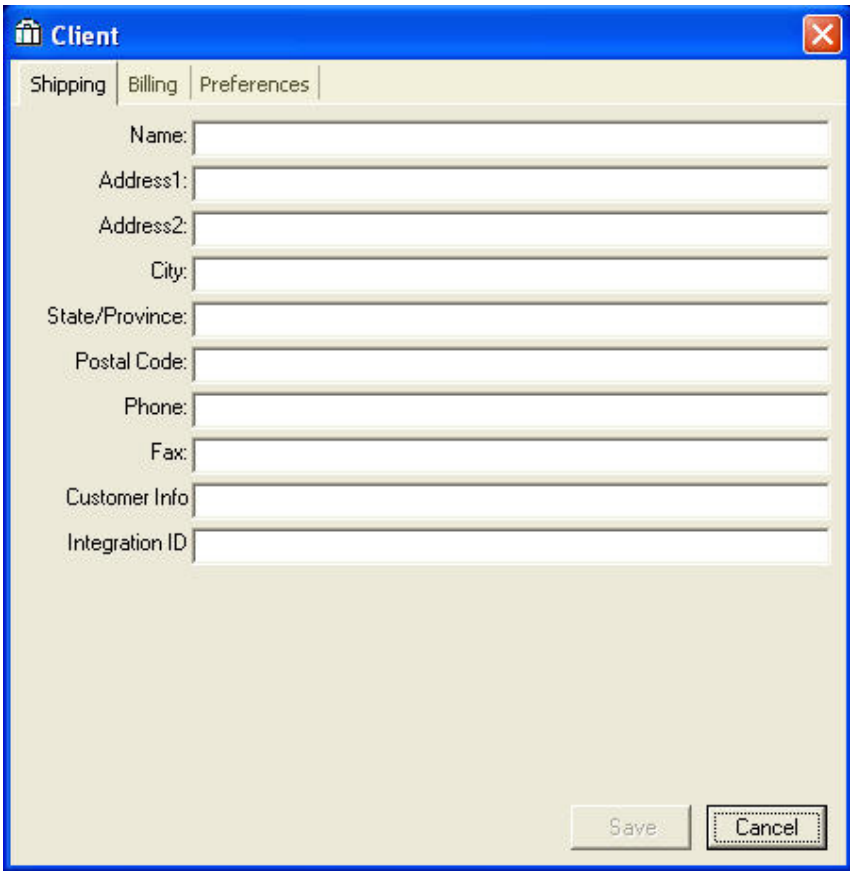


2. **To add your Client/Contact:**

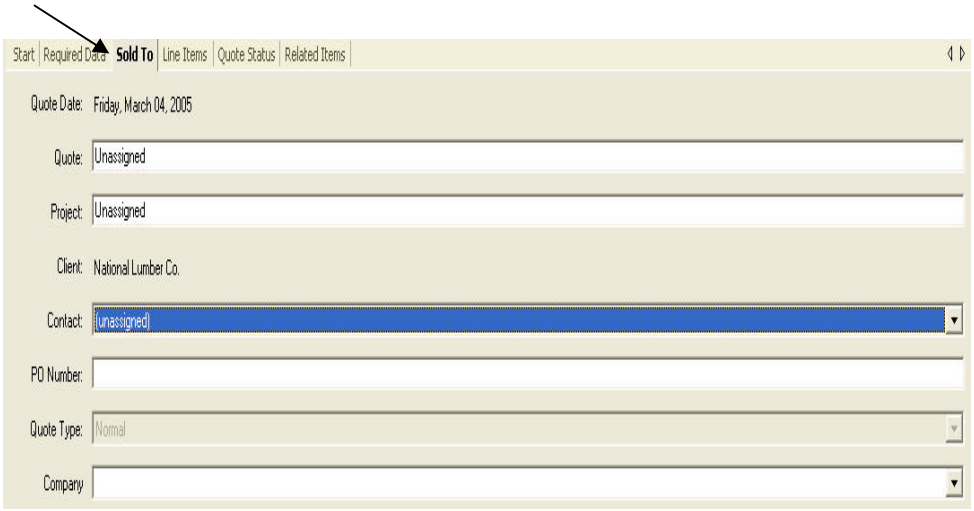
   Click on “Contact” on the left hand side.



2.2. Add your customer information and click save.



2.3. To select the customer go to the “Sold To” tab and use the drop down menu from the “contact” box.



3. To Build Your Unit:

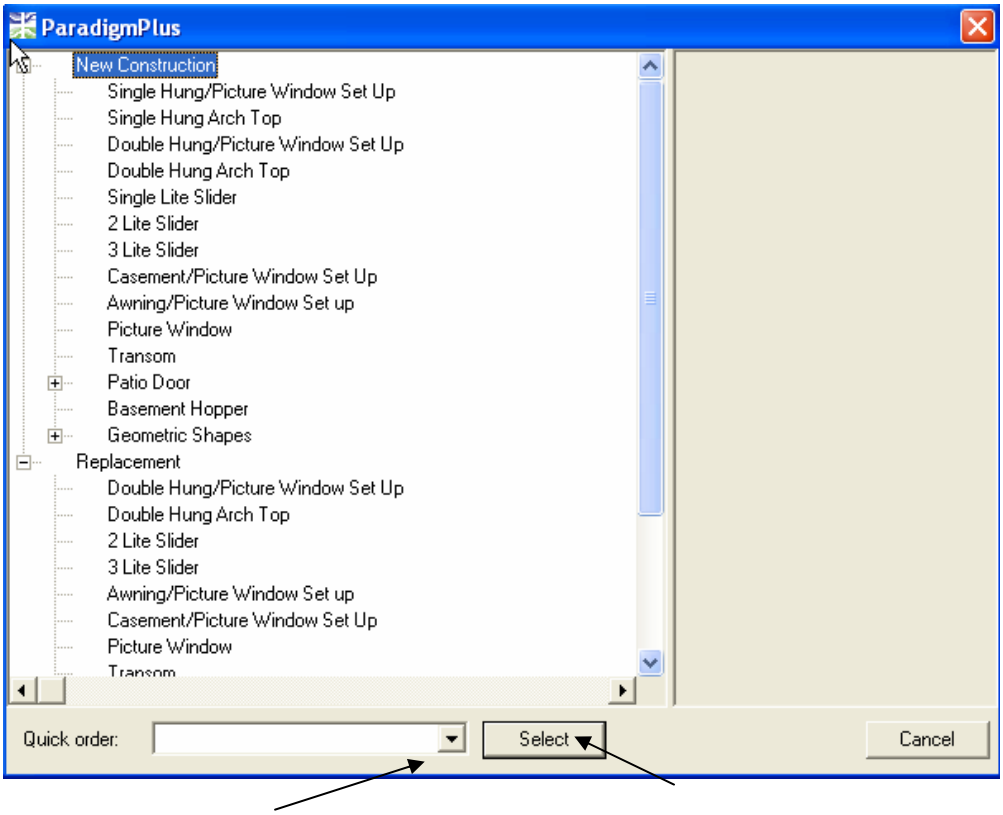
3.1. Click on “New” under “Line Items” tab

3.2. Click “OK” on the configurator: “Window and Door Products”.

4. To select Product:

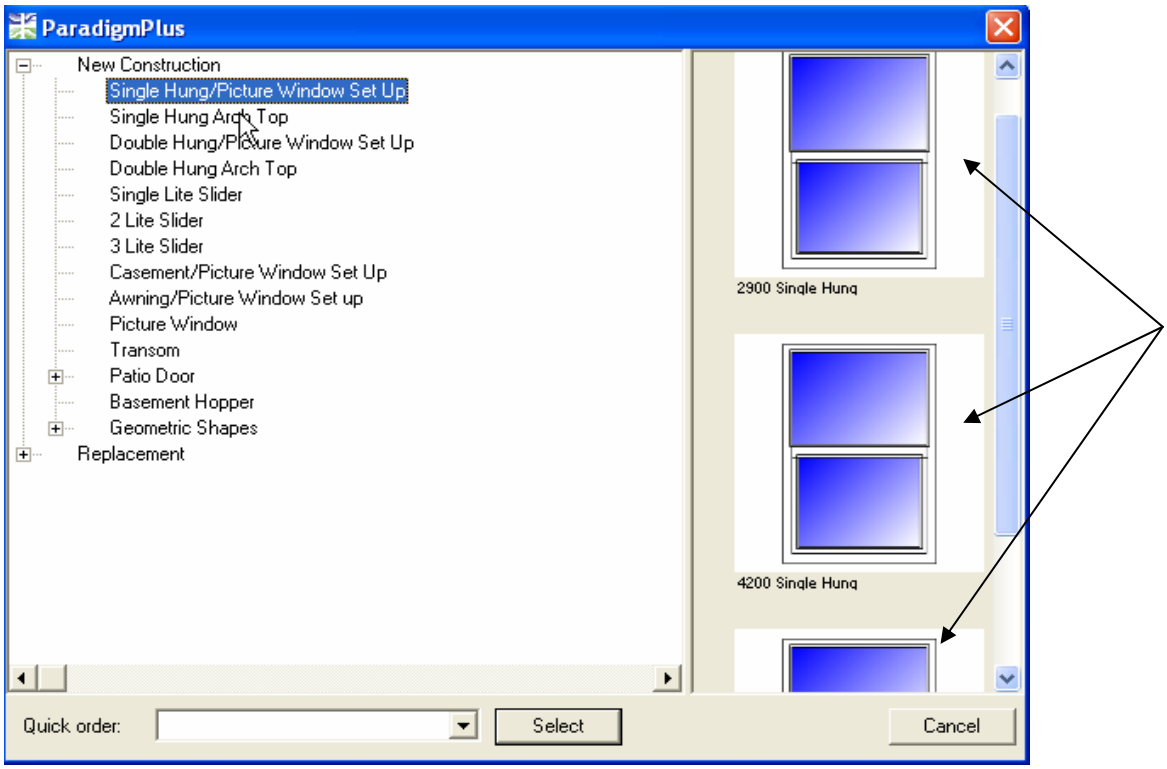
4.1. Click the plus sign for “New Construction” or “Replacement”.

4.2. Select window: Single Hung, Double Hung, PW, Etc.



Note: To Select a Product use the “Quick Order” Drop Down

4.3. Select Series: 2900, 4200, etc; by clicking on one of the drawings on the right hand side.

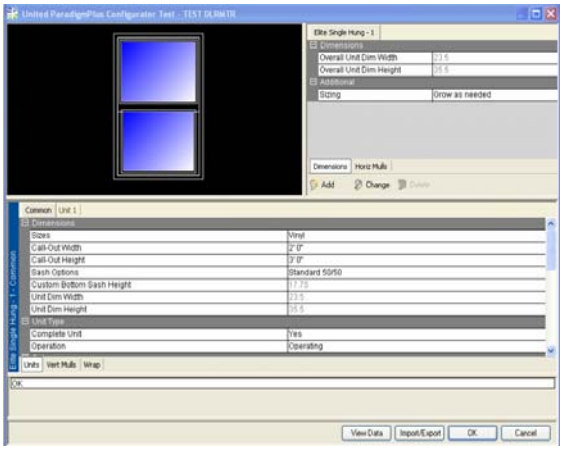


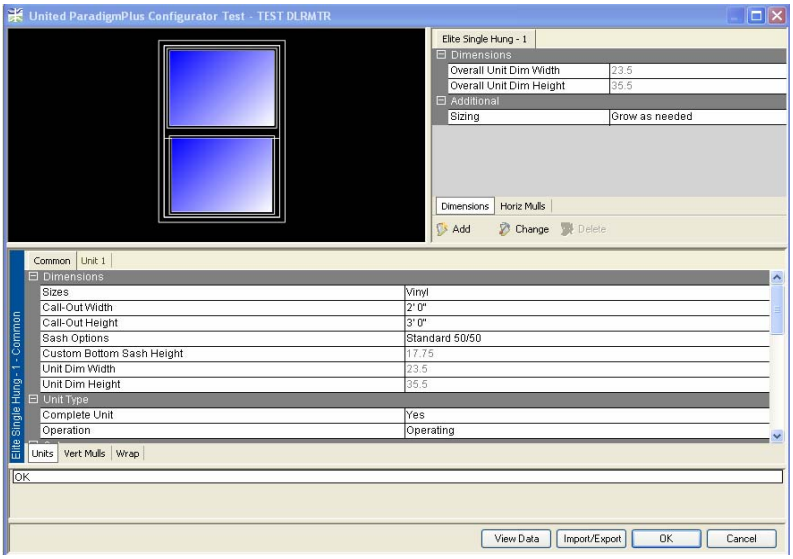
4.4. Select “Number Wide” (Single, Pair, Triple, Etc.) on drop down menu and click ok.

4.5. Select Vinyl or Wood size (default is Vinyl)

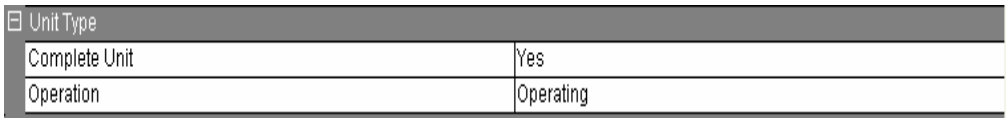
4.6. Within the drop down menu select Call-Out Width and Height (Standard size).

4.7. To enter a custom size: change the “Measurement Type” and “Sizing” options and enter the Unit dimension size needed.

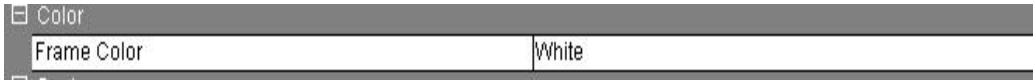




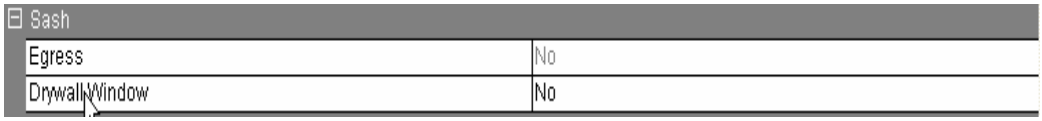
4.8. Unit Type (Complete Unit or a Part) / Operating Unit or PW:



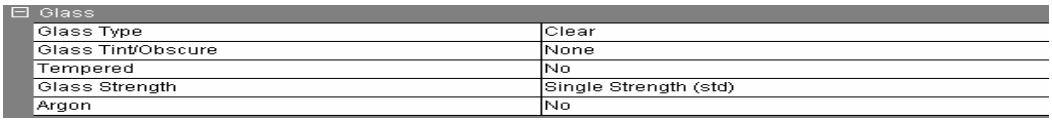
4.9. Select color (if needed), e.g. (white will be the default color used for all products):



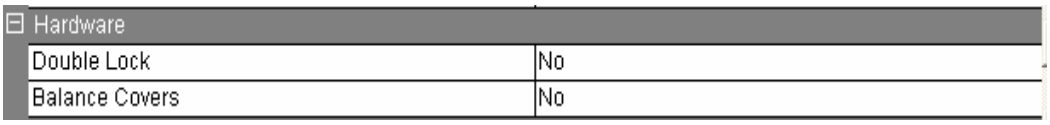
4.10. Select sash option (if needed), e.g. (Egress, Drywall, etc.):



4.11. Select glass option (if needed), e.g. (Smarter Low-E, Tint, Obscure, Tempered, etc.) The glass type default option will always be clear.



4.12. Select hardware option (if needed):



4.13. Select Screen Options:

Screen	
Screen	Yes
Screen Mesh	Fiberglass Mesh
Screen Ship Separate	No

4.14. Select grilles options (if needed):

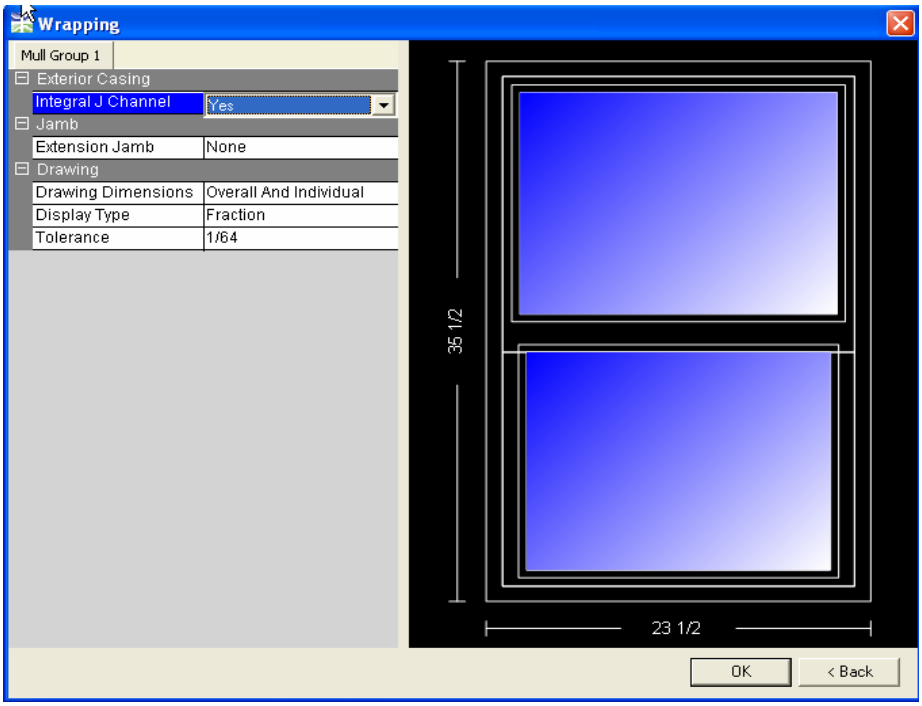
Grilles	
Grille Type	None
Grille Pattern	None

4.15. If a different grid pattern is needed, click on the picture. Scroll down to the grilles section. On “Top or Lower Grille Division Type” change from typical to custom using the drop down menu. Enter Number Wide and Number High. Click “OK”.

4.16. Choose frame options as needed and click “OK” to end your window configuration.

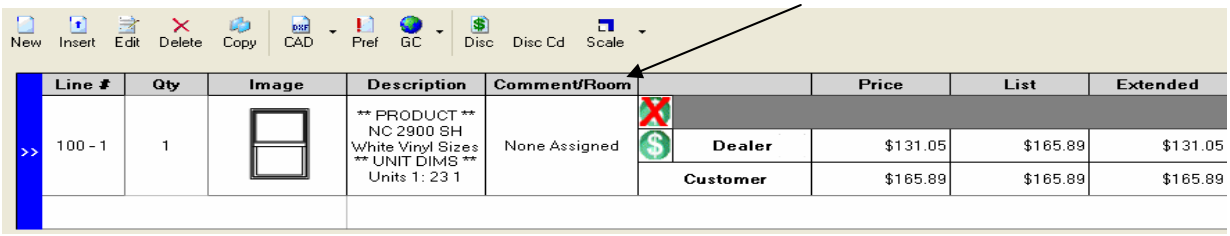
Note:

Please do not make any changes to the Drawing section; this has already been defaulted for your quotes needs.



4.17. Enter quantity of windows needed.

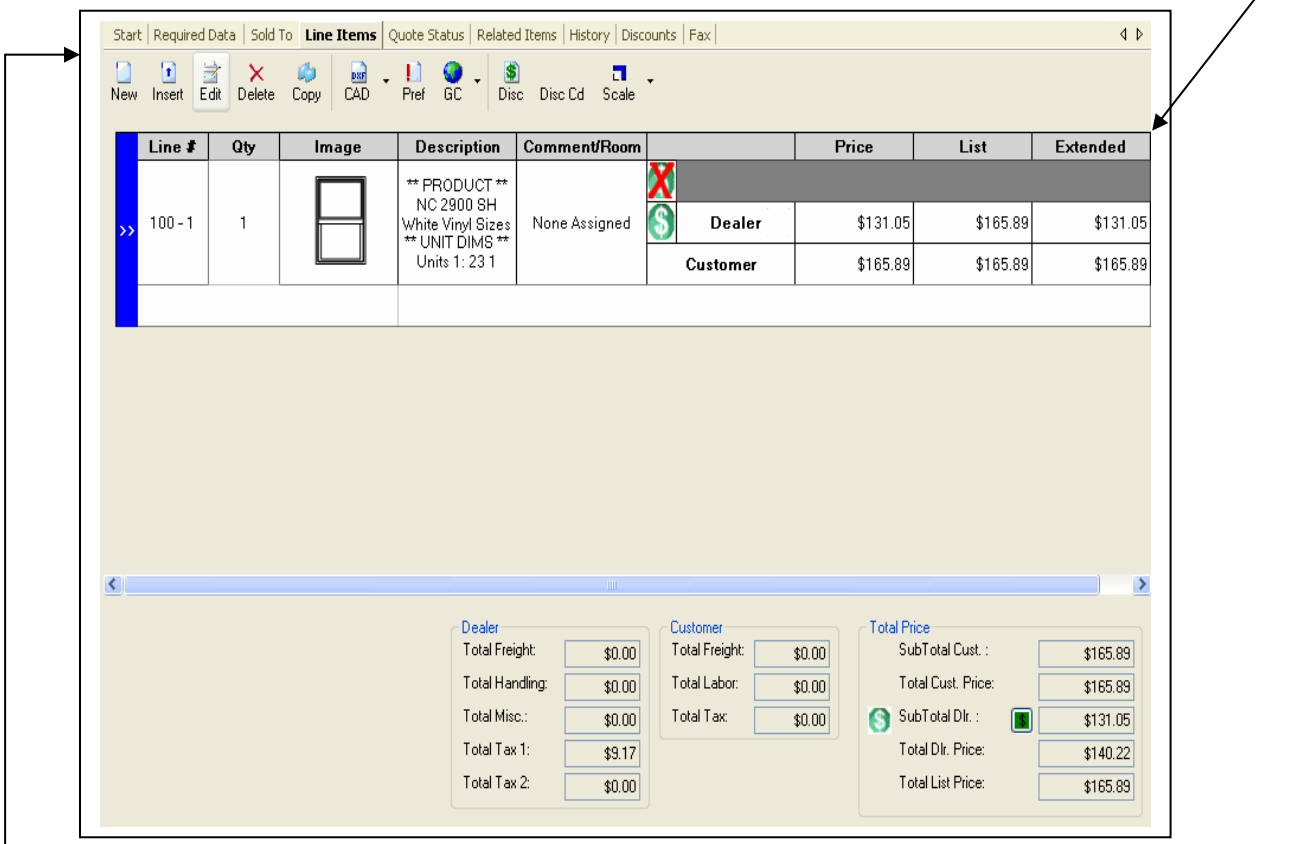
4.18. Write your comments in the Comment/Room box.



Step III

1. How to understand the quote on the screen:

1.1. The net price for your customer will be shown on the extended box.



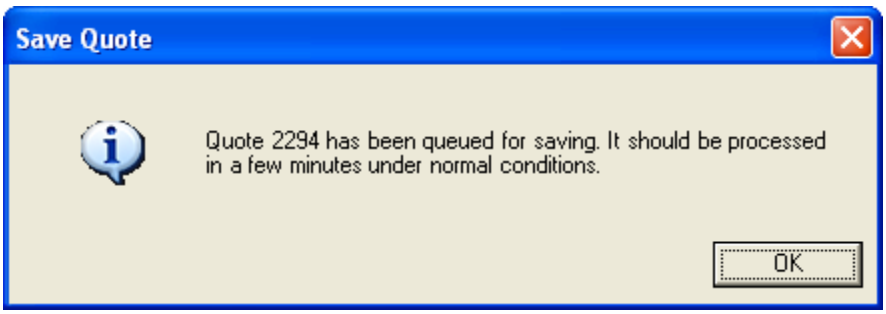
1.2. In this section, you have the options of copy, edit and/or delete a line.

2. Saving and Certifying your quote:

NOTE: If you click on the "Save Quote" button only, the quote number will not appear on the print out.

2.1. Click Save Quote button. Next, certify your quote by clicking on the Certify Button.

The quote number will appear:

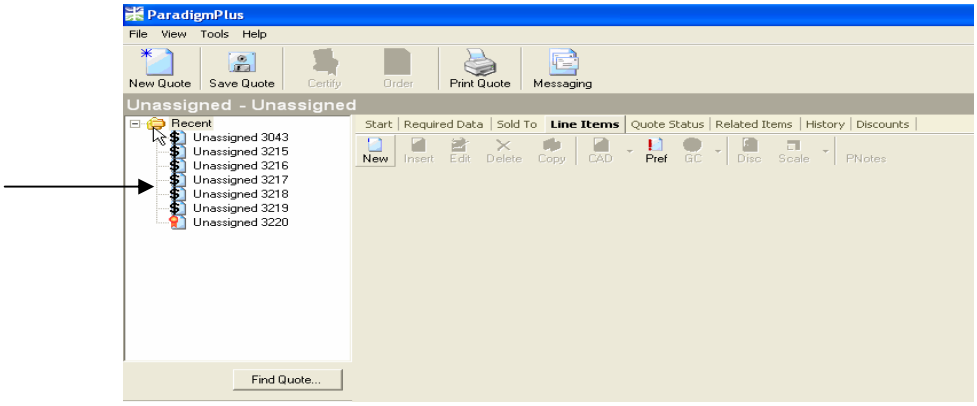


NOTES: A question mark will appear to show you the quote has been processed. After certification, if you make any changes to the quote, you will need to save the quote again and re-certify.

Step IV

1. Printing/Viewing your quote:

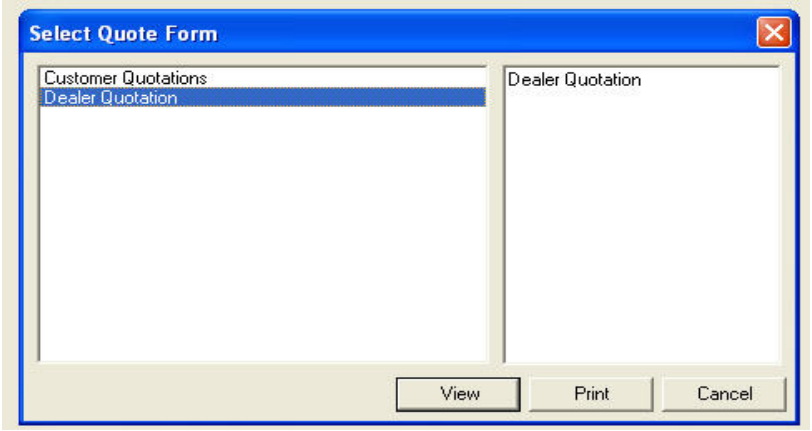
1.1. Open the quote to be printed from the list on the left hand side by double clicking the quote number.



1.2 Click on “Print Quote”

1.3. “Dealer Quotation” will show United Window & Door Mfg. pricing and “Customer Quotation” will show National Lumber Co. pricing. Select One.

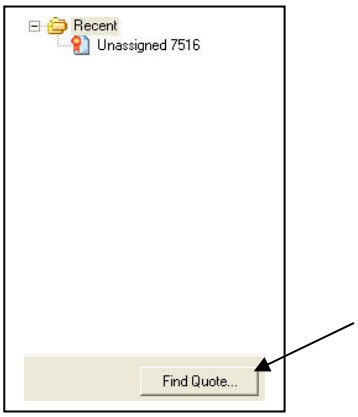
1.4. Click “View” or “Print” in the box.



Step V

1. **Finding a previous Quote:**

    1.1 Click on the “find quote” button.



2. **Types of search:**

    2.1. PO Number

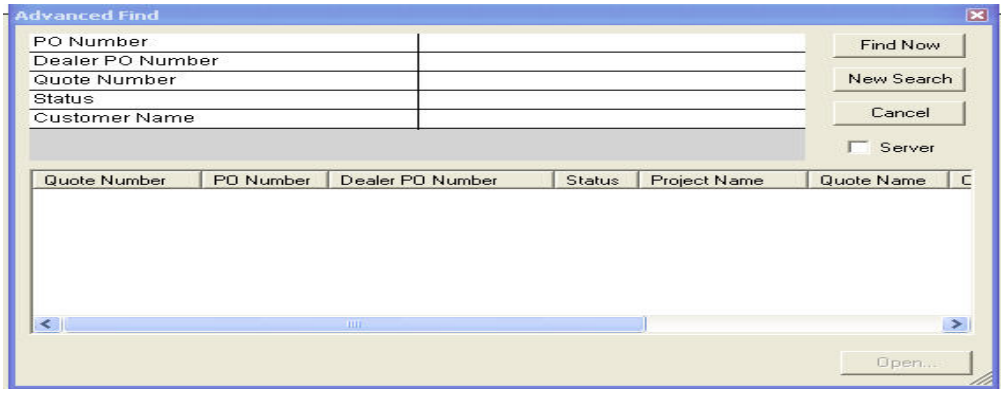
    2.2. Dealer PO Number

    2.3. Quote Number

    2.4. Status

    2.5. Customer Name

    2.6. Click “Find Now” and “Open” by selecting quote and doing clicking after quote appears.



NOTE: When finished with quote close screen by clicking on “File”, “Close Quote.”